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OREGON WINE BOARD

STRATEGIC PLAN

2020-2025
OUR VISION

At the Oregon Wine Board, we firmly believe that a rising tide lifts all boats.

From our unique statewide position, the OWB is a critical partner to the Oregon wine industry. We work to raise the tide by cultivating an environment in which our grapes and wines are coveted, winegrowers and producers are well-equipped to compete, all people are treated with equal respect, and all are buoyed by our industry’s collective success.
STRATEGIC PRIORITIES

1. ENHANCE THE REPUTATION OF OREGON WINE

What it means: OWB will define, protect and promote the reputation of Oregon wine globally.

Objectives:

• Establish a well-defined Oregon Wine brand with focused messages, attributes, and brand guidelines
• Promote statewide alignment to amplify and ensure consistency of brand message to external audiences
• Increase global awareness of the quality and breadth of the Oregon wine category
• Fuel research that sustains and advances wine and grape quality

Key activities:

• Programs that advance the Marketing & Communications Strategic Plan priorities, in particular:
  – New brand identity development and rollout
  – Media relations efforts that build brand image
  – Domestic and international trade education and awareness
• Solicit and fund research that addresses the Wine Quality pillar of Vit & Eno Research Strategic Plan
**STRATEGIC PRIORITIES**

2. **DELIVER KNOWLEDGE & INSIGHTS**

*What it means:* OWB will advance the industry’s collective intelligence in support of growing, making and selling quality wines.

**Objectives:**
- Commission and curate technical, business and market research to advance industry practices
- Be the experts on the Oregon wine industry in support of telling its stories and communicating its impact
- Make data and insights easily accessible to industry members at all times
- Leverage funding and maximize knowledge-sharing through partnerships in research and education

**Key activities:**
- Solicit and fund research projects that address the Vit & Eno Research Strategic Plan priorities
- Industry education program addressing the most timely and crucial business and technical development needs
- Oregon wine industry studies, e.g. Vineyard & Winery Report, Economic Impact Study
- Actionable insights and information available and easily accessible to all industry members (including technical, market and consumer research)
STRATEGIC PRIORITIES

3. PROVIDE LEADERSHIP AND PARTNERSHIP

What it means: OWB will harness statewide strength to unite and empower the Oregon wine industry.

Objectives:
- Prioritize activities that will have greatest impact on the advancement of the statewide industry
- Establish development opportunities for regional associations appropriate to their lifestage needs and in service to the advancement of Brand Oregon
- Institutionalize venues for cooperation and input-gathering among regions and other industry groups

Key activities:
- Constitute, charter and administer committees with statewide representation
- Articulate and publish opportunities and guidelines for industry groups to access OWB resources
- Provide opportunities for intra-industry information and ideas sharing
- Make information about the OWB, its activities and opportunities for involvement clear and easy to access across its main communications channels
SUCCESS REQUIREMENTS

STRATEGIC PARTNERSHIPS
Create strong partnerships with wine and industry-tangential organizations to amplify our work
• Establish venues for Board-level interaction among key industry groups
• Strengthen key partnerships in service to strategic pillar objectives (e.g. OSU, Travel Oregon)

TRANSPARENCY
Achieve clear priority-setting, transparent resource allocation, and unambiguous communication
• Improve clarity and ease of access to information regarding budgeting and resource allocation
• Publicize goals and strategies that drive decision-making and influence programming
• Be clear about what is in-scope and what is out-of-scope over next 3-5 years

PROFESSIONAL DEVELOPMENT
Sustain and grow capabilities through professional enrichment and continuing education opportunities
• Support relevant continuing education opportunities for all staff members
• Advance Board and staff understanding of topics of equity and inclusion

METRICS OF SUCCESS
Institutionalize a process for tracking and communicating progress through measurable metrics
• Identify key metrics to monitor progress against strategic plan
• Develop scorecard to track and communicate metrics to stakeholders
APPENDIX A

STRATEGIC PLAN ON A PAGE
OREGON WINE BOARD STRATEGIC PLAN ON A PAGE

MANDATE / MISSION
OWB’s legislated mandate is to promote Oregon’s wine-grape growing and winemaking industries and to support research to develop sustainable wine and wine grape business practices within Oregon.

VISION
The OWB firmly believes that a rising tide lifts all boats. In its unique statewide position, the OWB is critical partner to the Oregon wine industry working to raise the tide by cultivating an environment in which our grapes and wines are coveted, winegrowers and producers are well-equipped to compete, all people are treated with equal respect, and all are buoyed by our industry’s collective success.

STRATEGIC PRIORITIES

ENHANCE THE REPUTATION OF OREGON WINE
Define, protect and promote the reputation of Oregon wine globally

DELIVER KNOWLEDGE & INSIGHTS
Advance collective intelligence in support of growing, making and selling quality wines

PROVIDE LEADERSHIP & PARTNERSHIP
Harness statewide strength to unite and empower the Oregon wine industry

SUCCESS REQUIREMENTS
TRANSPARENCY: Achieve clear priority-setting, transparent resource allocation, and unambiguous communication
STRATEGIC PARTNERSHIPS: Create strong partnerships with wine and industry-tangential organizations to amplify our work
PROFESSIONAL DEVELOPMENT: Sustain and grow capabilities through professional enrichment and continuing education opportunities
METRICS OF SUCCESS: Institutionalize a process for tracking and communicating progress through measurable metrics
APPENDIX B
FUNCTIONAL STRATEGIC PLANS
**MISSION**
The Oregon Wine Board operates for the “purpose of supporting enological, viticultural and economic research to develop sustainable business practices for wine grape growing and wine making within Oregon and supporting the promotion of Oregon’s wine grape growing and wine making industries.”

**VISION**
OWB’s V&E Research program will champion continuous improvement of Oregon’s capacity to produce world-class wines that reflect a sense of place by sponsoring industry-leading research in the development of sustainable practices and climate-adaptive skills.

**STRATEGIC PILLARS**

**WINE QUALITY**
Support advancements in wine quality and site expression by enhancing markers of quality in the vineyard and winery

**SUSTAINABLE PRODUCTION**
Lead in developing sustainable practices to minimize inputs and reduce impact

**CHANGING CLIMATE**
Facilitate adaptation of vineyard and winemaking practices to future climatic conditions

**FOUNDATIONAL RESEARCH**
Foster V&E discovery that has the potential to provide foundations for future applications that address the other three strategic pillars

**SUCCESS REQUIREMENTS**

**METRICS OF SUCCESS:** Pre-specify and measure markers of relevance, quality and utility of results

**ECONOMIC IMPACT:** Quantify and inform financial impact of implementation

**EDUCATION & OUTREACH:** Enable industry to integrate results into vineyard and winery practices
**OWB MARKETING & COMMUNICATIONS STRATEGIC PLAN**

**MISSION**
The Oregon Wine Board operates for the “purpose of supporting enological, viticultural and economic research to develop sustainable business practices for wine grape growing and wine making within Oregon and supporting the promotion of Oregon’s wine grape growing and wine making industries.”

**VISION**
OWB’s Marketing & Communications program will cement Oregon as an essential selection for fine wine enthusiasts and professionals worldwide by championing demand-led growth for the long-term viability of Oregon’s wine industry.

**STRATEGIC PILLARS**

<table>
<thead>
<tr>
<th>BRAND EQUITY</th>
<th>MARKET EXPANSION</th>
<th>WINE TOURISM</th>
<th>INSIGHTS &amp; INTEGRATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elevate the esteem of the Oregon Wine brand globally</td>
<td>Build multi-tier trade demand to generate growth opportunities</td>
<td>Champion high value, engaged and sustainable wine tourism statewide</td>
<td>Enrich industry intelligence, dialogue and alignment</td>
</tr>
</tbody>
</table>

**SUCCESS REQUIREMENTS**

**INDUSTRY EDUCATION:** Offer educational programs that equip wineries to maximize OWB MarComm efforts for their businesses

**STRATEGIC PARTNERSHIPS:** Clarify roles and facilitate alignment to maximize efforts throughout Oregon’s wine and tourism ecosystem

**METRICS OF SUCCESS:** Track, measure and report on key metrics to show progress and inform annual planning
APPENDIX C

CONTEXT: INDUSTRY
OREGON WINE BUSINESS GROWTH

The number of wineries has grown nearly 6-fold since 2000, and the number of vineyards has increased almost 250%.
OREGON WINE GROWTH ACROSS CHANNELS

In retail and direct channels, Oregon leads volume growth among other major domestic wine producing regions.
Despite impressive growth rates in plantings, production and sales, Oregon remains a small player on the world wine stage, accounting for just over 1% of U.S. wine production and about 0.15% of global wine production.
Wine grape growing and winemaking in Oregon is concentrated in the northern part of the Willamette Valley. Growing regions to the south and east comprise about 40% of harvested tons and just over a quarter of the crush. These figures have only changed moderately over the past 10 years.

### 2018 Harvest (Tons)
- **North Willamette Valley**: 59%
- **South Willamette Valley**: 14%
- **Rogue Valley**: 11%
- **Umpqua Valley**: 9%
- **All other**: 7%

### 2018 Crush (Tons)
- **North Willamette Valley**: 73%
- **South Willamette Valley**: 11%
- **Rogue Valley**: 8%
- **Umpqua Valley**: 4%
- **All other**: 4%
KEY EXTERNAL TRENDS: OREGON WINE IN 2030

Planning work done in 2018-19 by strategic committees for Research and Marketing & Communications anticipate these external factors as influencing the Oregon wine industry’s future.

- Implications of a changing climate
- Increased variety in scale of operations
- Increased cost of production
- Increased demand for sustainable farming
- Increased positive perception of brand Oregon
- Distributor consolidation
- Shifting consumer demographics & needs
- Expansion of DTC sales channels and volume
APPENDIX D

CONTEXT: ORGANIZATION
OWB FOUNDING LEGISLATION (HB 3442, 2003)

WHAT IT SAYS

“The Oregon Wine Board shall operate for the purpose of supporting enological, viticultural and economic research to develop sustainable business practices for wine grape growing and wine making within Oregon and supporting the promotion of Oregon’s wine grape-growing and winemaking industries.”

HOW WE DO IT

• Marketing
• Viticulture & Enology Research
• Media Relations
• Education
2020 BOARD COMPOSITION: REGIONAL REPRESENTATION

North Willamette Valley: 5
South Willamette Valley: 1
Umpqua Valley: 1
Rogue Valley: 1
Columbia Gorge: 1

OREGON WINE BOARD
The Oregon Wine Board’s approved 2020-21 operating budget is $2.9 million. Funding is derived in large part from the grape tax, assessed at $25 / ton. Although tons harvested and the number of OWB stakeholders has grown significantly over time, the tax rate has remained the same since 1983. It would take $64 in 2020 to match $25 in 1983.

The OWB’s tax funding is augmented by grants supporting a variety of programs.